



COMMUNITY CREDIT UNION of FLORIDA
Position Description
Teller I

Reports to: Head Teller/Regional Branch Director
Department: Branch

Grade: 5
Job Group: Non-exempt

The primary purpose of this position is to assist Community Credit Union of Florida in living out our Mission, *“Always improve the financial well-being of our members and make a positive difference in our community,”* by delivering outstanding service to both internal and external members. A key element of excellent service is to identify the financial needs of each member and recommend an appropriate credit union solution. The Teller I is responsible for performing routine branch and member services duties: accepts deposits, processes loan payments, cashes checks and savings withdrawals; assists with night depository duties; promotes business for the credit union by maintaining good member relations and referring members to appropriate staff for new services.

ESSENTIAL DUTIES

- 1) Deliver service to both internal and external members that is in alignment with the credit union’s Service Promises.
- 2) Meets all established service goals as measured by the Internal Service Survey, and possess adequate product knowledge as measured by the annual product knowledge certification assessment.
- 3) Performing job duties within our bylaws, regulations, Board of Directors policies, established internal and external service standards and our work procedures.
- 4) Demonstrate enthusiastic support of corporate mission, core values and long term objectives, and assists in attaining established departmental goals and adhering to all credit union standard operating policies and procedures, as well as state and federal regulations and guidelines.
- 3) Responsible for accurately completing daily task activities and entering data in timely manner to ensure 70-80% engagement metric is met. Responsible for serving the membership, perform transactions and other services in a professional, timely and accurate manner.
- 4) Performs routine member transactions including deposits, withdrawals, cash advances, transfers, money orders, within policy guidelines and with a consistent balancing record; confirms all necessary documents are properly authorized, are in proper form and are within authorized limits. Receives payments for mortgage, installment and share secured loans, ensuring that payments equal the amount due and that all late charges, if applicable, are collected.
- 5) Assists with night depository duties; logging bags, processing deposits, making change orders, issuing receipts and returning bags to members.
- 6) Processes ATM deposits and balancing duties. Processes coin deposits and balance coin machine. Remove and replace coin bags as needed.
- 7) Provides information on credit union services including eligibility for membership, types of credit union accounts, interest rates, current dividend rates, locations, office hours, and telephone numbers. Actively promotes and cross-sells new account products and services by providing recommendations and assisting members in whatever capacity necessary.

- 8) Assists members through the lobby management with services including, but not limited to, check orders, stop payments, wire transfers, coin machine, statement copies, records research, pinning or re-issuing debit cards, accessing safety deposit boxes and maintaining records and notary as needed.
 - 9) Assists with telephone support by responding to member inquiries and problems in a professional, timely manner; follows up on inquiries with informational materials and/or phone contact; investigates and corrects errors and resolves problems or other issues; helps members to utilize electronic delivery channels for convenience.
 - 10) Adheres to security controls policy and procedures to aid in detection and prevention of fraud, theft, robberies, threats of violence, fires, accidents, facility safety, etc. Maintains maximum security over cash, operating procedures, and other valuables on hand according to established security policy. Balances cash drawer daily and verifies cash being returned to vault.
 - 11) Updates member information and verifies identity, processes mail or reports and open and perform end of day balancing including checks as requested.
 - 12) Performs all other related duties as assigned and special projects as assigned.
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ENVIRONMENT AND PHYSICAL ACTIVITY

The environment for this position is an open, non-confined office-type setting that is clean and comfortable where the incumbent is free to move about at will. It may include some minor annoyances such as noise, odors, drafts.

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the duties of this job, the employee is frequently required to spend time writing, typing, speaking, listening, lifting (up to 50 pounds), carrying, seeing (such as close, color and peripheral vision, depth perception, and adjusted focus), sitting for long periods of time (up to 8 hours), pulling, walking, standing, squatting, kneeling, and reaching.

The incumbent for this position may operate any or all of the following: telephone, copy and fax machines, calculator, film equipment, typewriter, computer terminal, personal computer, and related printers.

MENTAL DEMANDS

The incumbent in this position must be able to read documents or instruments, perform detailed work and problem solve; possess excellent member contact and verbal and written communication skills; have strong math and analytical reasoning skills; and the ability to effectively handle stress, multiple concurrent tasks, and constant interruptions.

POSITION REQUIREMENTS

These specifications are general guidelines based on the minimum experience normally considered essential to the satisfactory performance of this position. The requirements listed below are representative of the knowledge, skill,

and/or ability required to perform the position in a satisfactory manner. Individual abilities may result in some deviation from these guidelines.

- High school diploma or general education degree (GED); or six (6) months or more related experience and/or training; or the equivalent combination of education and experience. Work related experience should consist of a cash handling and exceptional customer service and sales background. Educational experience, through in-house training sessions, formal school or financial industry related curriculum, should be business or financial industry related.
- Basic skills in computer terminal and personal computer operation.
- Basic typing skills to meet production needs of the position.
- Basic math skills; calculate interest and balance accounts; add, subtract, multiply and divide in all units of measure, using whole numbers, common fractions and decimals; locate routine mathematical errors; count currency, coin and negotiable instruments in a timely manner.
- Effective oral and interpersonal communication skills with the ability to apply common sense to carry out instructions, interpret documents, understand procedures and to communicate clearly to members and employees.
- Ability to deal with difficult problems.
- Effective organizational and time management skills with ability to multi-task, the ability to work with close supervision while performing duties and be a strong team player.
- Ability to handle simple problems in nature requiring some analysis or research to determine best solution.

The incumbent must be able to perform this position safely, without endangering the health or safety to individual or others.

Management reserves the right to change this position description at any time according to business needs.

Review and Approval: Indicates review by incumbent and approval by supervisor.

Employee: _____ Date: _____

Supervisor: _____ Date: _____

Area Supervisor: _____ Date: _____

Department Head: _____ Date: _____

Human Resources: _____ Date: _____